



**Communications & Liaison
STAKEHOLDER LIAISON**

Uploading Forms 2848/8821 with electronic signatures

Richard Furlong, Jr.
Senior Stakeholder Liaison

Yvette Brooks- Williams
Senior Stakeholder Liaison

**45th Annual Delaware Federal & State Tax Institutes
December 7, 2021**



Objectives

- **Understand new option for submitting third-party authorization forms/signatures electronically**
- **Review step-by-step process for successfully uploading third-party authorization forms**
- **Learn what “electronic” signatures are acceptable**
- **Understand ways to authenticate taxpayers’ identities when conducting remote transactions**



Taxpayer First Act – Section 2302 (1/3)

- The Legislation - The Taxpayer First Act (TFA) was signed into law on July 1, 2019. TFA includes 45 legislative provisions with a goal to modernize and improve the IRS. The provisions represent a substantial change to IRS organizationally, operationally, and technologically. The focus for this project is Provision 2302.**



Taxpayer First Act – Section 2302 (2/3)

- **The Provision - The Act requires IRS to establish uniform standards and procedures for the acceptance of taxpayers' electronic signatures, which are meant to authorize disclosure to a practitioner or for any power of attorney granted by a taxpayer to a practitioner.**



Taxpayer First Act – Section 2302 (3/3)

- **The Goal - Lead the implementation of the Taxpayer Digital Communications (TDC) solution (to be released in January 2021) to allow for the submission of digital signatures on Forms 2848 and 8821 while monitoring the longer-term Tax Professional Account solution (first release in July of 2021) to allow for online authorizations.**



TFA Provision 2302

- **TFA, Section 2302, states, “Not later than 6 months after the date of the enactment of this subparagraph, the Secretary shall publish guidance to establish uniform standards and procedures for the acceptance of taxpayers’ signatures appearing in electronic form with respect to any request for disclosure of a taxpayer’s return or return information under section 6103(c) to a practitioner or any power of attorney granted by a taxpayer to a practitioner.”**



TFA Provision 2302 – cont'd

- **On December 3, 2019, IRS published an overarching e-Signature policy (IRM 10.10.1) addressing electronic signature policy for all IRS forms (unless explicitly excluded).**
 - Forms 2848 (Power of Attorney) and 8821 (Tax Information Authorization) not specifically addressed in IRM as electronic signatures are not currently accepted on either form.



TFA Provision 2302 – January 2021

Launch Submit Forms 2848 and 8821 Online

- **IRS launches “Submit Forms 2848 and 8821 Online,” a special IRS.gov page featuring an existing IRS secure messaging platform that allows for document upload. Must verify identity through Secure Access or use existing Secure Access username/password.**
- **Tax pros answer a few questions and check box that client’s identity was authenticated and then upload forms to the platform.**



TFA Provision 2302 – January 2021- cont'd

- **IRS Tax pros would have the option of using commercial digital signature products to obtain client e-signatures on Forms 2848/8821.**
- Tax pros must follow the “Electronic Signatures” requirements outlined in the form instructions to verify the taxpayer’s identity when the taxpayer electronically signs in a remote transaction.
- **Forms can be submitted in either PDF or image formats such as jpeg or png; only one form may be uploaded at a time. Forms are routed to CAF unit for normal processing.**



TFA Provision 2302 – Summer 2021 (1/3)

Launch Tax Pro Account

- **IRS launches new Tax Pro Account, a secure, self-service online portal giving tax pros another way to allow clients to sign authorizations electronically.**
- **Tax pros access their Tax Pro Account by passing Secure Access authentication or by using username/password from existing account, such as e-Services.**



TFA Provision 2302 – Summer 2021 (2/3)

Launch Tax Pro Account

- **Tax pros initiate authorizations within Tax Pro Account, which interfaces with the online account for taxpayers. Authorizations routed to the client’s online account for e-signature.**
- **Taxpayer digitally signs authorization forms within his/her online. account. Authorizations routed to Centralized Authorization File (CAF) automatically.**



TFA Provision 2302 – Summer 2021 (3/3)

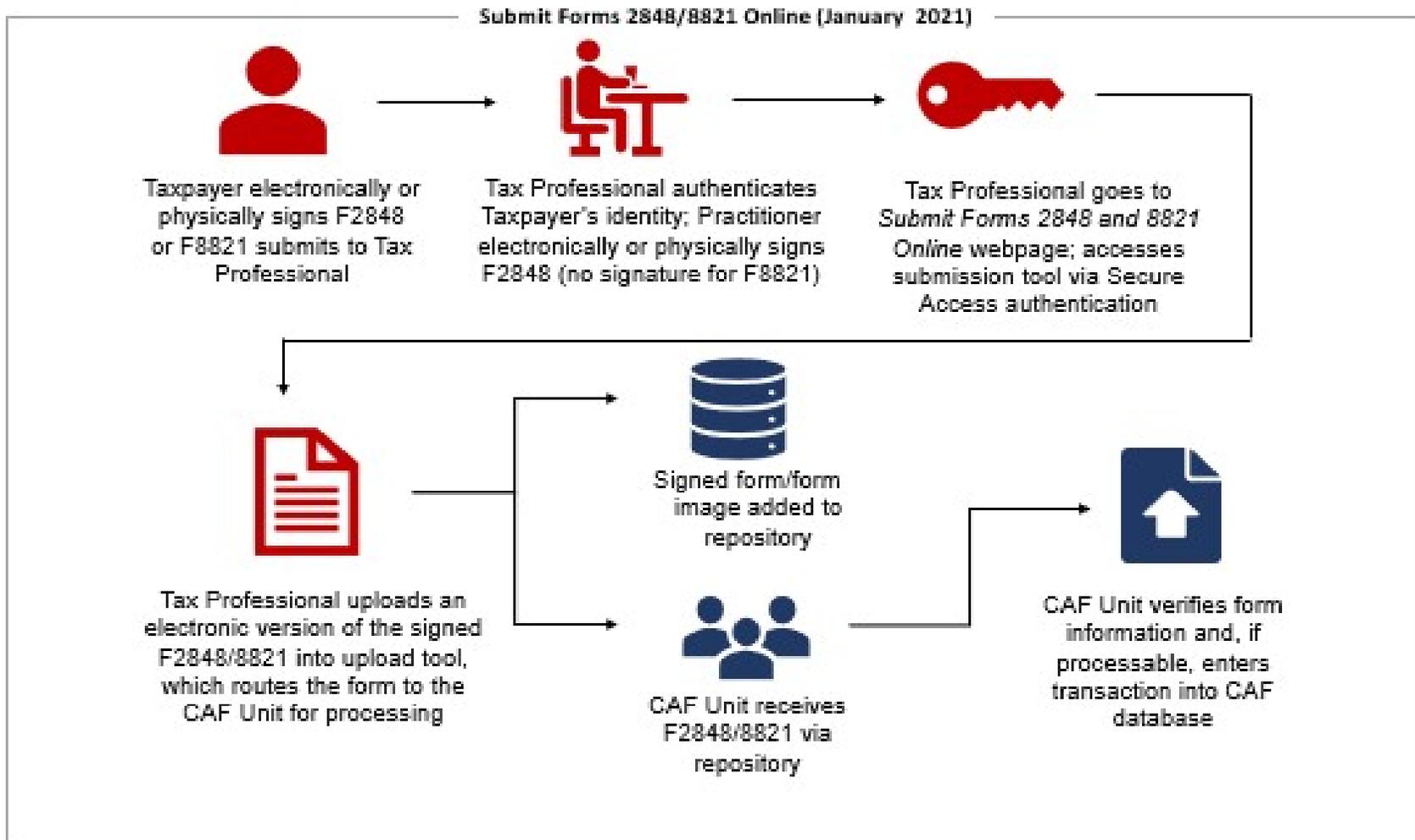
Launch Tax Pro Account

- **Wait period for CAF processing is minimized with most authorizations processing immediately.**
- **Tax Pro Account functionality increases over time.**



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Proposed Process Flow – Submit Forms 2848 and 8821 Online





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Enrolled Agents

Annual Filing Season Program Participants

Enrolled Retirement Plan Agents

Certified Professional Employer Organization (CPEO)

Enrolled Actuaries

E-File Providers

Modernized e-File

Submit Forms 2848 and 8821 Online



E-Services

Online tools for tax professionals

[Access E-Services](#)



PTIN System

Status: ✔ Online

Renew or register for 2021 by December 31

[Renew or Register](#)

[Serve Your Clients](#)

E-Services, EINs, filing, forms, procedures and tax guidance

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Circular 230, PTIN requirements, due diligence, preparer compliance

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- [Practitioner Priority Service \(phone numbers\)](#)

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Log in, continued



We sent a security code to your phone

We sent a text message to your phone (ending in 1991). Please enter the code below.

6-digit security code

[Resend Security Code](#)
[No longer have access to this phone?](#)

CONTINUE >

[If you can't get a text message right now, you can get a security code via phone call.](#)

[Logout](#)



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Taxpayer Digital Communications



We sent a security code to your phone

We sent a text message to your phone (ending in 1991). Please enter the code below.

6-digit security code

[Resend Security Code](#)
[No longer have access to this phone?](#)

CONTINUE >

[If you can't get a text message right now, you can get a security code via phone call.](#)

[Logout](#)



Answer basic questions; “Guide Me”

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IRS

Welcome, Taxpayer Name | Logout

Guide Me

Please answer the questions below so we can route you to the right place.

? What type of request would you like to submit?

- Form 2848, Power of Attorney and Declaration of Representative
- Form 8821, Tax Information Authorization
- Revocation/withdrawal of an existing authorization

Next

Answered Questions

19 Not to be used or cited as precedent



Guide Me – Electronic Signature

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IRS

Welcome, Taxpayer Name | Logout

Guide Me

Please answer the questions below so we can route you to the right place.

Yes

No

Next

Answered Questions

What type of request would you like to submit?

Form 2848, Power of Attorney and Declaration of Representative

20 Not to be used or cited as precedent



Communications & Liaison STAKEHOLDER LIAISON

Guide Me – Attestation

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IRS

Welcome, Taxpayer Name | Logout

Guide Me

Please answer the questions below so we can route you to the right place.

? Under penalties of perjury, I declare I have authenticated the identity of the taxpayer on line 1 of the form or have personal knowledge of the taxpayer's identity. See the [FAQs](#) or the form instructions for authentication requirements.

Yes
 No

Next

Answered Questions

What type of request would you like to submit?
Form 2848, Power of Attorney and Declaration of Representative

Did the taxpayer electronically sign the form in a remote transaction?
Yes

21 Not to be used or cited as precedent



Communications & Liaison STAKEHOLDER LIAISON

Guide Me – Routing

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IRS

Welcome, Taxpayer Name | Logout

Guide Me

Please answer the questions below so we can route you to the right place.

? In order to route your submission properly, please select one of the following for the taxpayer on line 1 of the form:

The taxpayer:

- has a domestic address
- has an international address
- is participating in a Low Income Tax Clinic (LITC) or Student Tax Clinic Program (STCP)

Next

Answered Questions

- What type of request would you like to submit?**
Form 2848, Power of Attorney and Declaration of Representative
- Did the taxpayer electronically sign the form in a remote transaction?**
Yes
- Under penalties of perjury, I declare I have authenticated the identity of the taxpayer on line 1 of the form or have personal knowledge of the taxpayer's identity. See the [FAQs](#) or the form instructions for authentication requirements.**
Yes

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Taxpayer info and document upload

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Welcome, Taxpayer Name | Logout

Please note:

- Only Forms 2848 and 8821 will be processed.
- Limit one form in each submission.
- Do not submit correspondence or notes related to the form.
- Do not send attachments over 15MB.

What is the taxpayer Social Security Number(SSN), Employer Identification Number(EIN) or Individual Identification Number(ITIN)? *

SSN [nnn-nn-nnnn] - -
 EIN [nn-nnnnnnnn] -
 ITIN [9nn-nn-nnnn] - -

Attach File 0 Submit

Preferred files types .pdf , .jpeg , .jpg , .gif

Limit one taxpayer third-party authorization form per submission

Attachments:



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Upload your form



We sent a security code to your phone

We sent a text message to your phone (ending in 1991). Please enter the code below.

6-digit security code

[Resend Security Code](#)
[No longer have access to this phone?](#)

CONTINUE >

[If you can't get a text message right now, you can get a security code via phone call.](#)

[Logout](#)



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Submit

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Welcome, twenty sbse | Logout

Please note:

- Only Forms 2848 and 8821 will be processed.
- Limit one form in each submission.
- Do not submit correspondence or notes related to the form.
- Do not send attachments over 15MB.

What is the taxpayer Social Security Number(SSN), Employer Identification Number(EIN) or Individual Identification Number(ITIN)? *

SSN [nnn-nn-nnnn] - -

EIN [nn-nnnnnnnn] -

ITIN [9nn-nn-nnnn] - -

Attach File 1 Submit

Preferred files types .pdf , .jpeg , .jpg , .gif
Limit one taxpayer third-party authorization form per submission

Attachments:

Form 2848 John Doe.pdf X

25 Not to be used or cited as precedent



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Success!



Success! Your form was successfully submitted to the IRS for processing.

- *You will receive an e-mail confirming the submission.*
- *Sending the same form via mail or fax may delay processing.*

[Submit another form](#)

[Exit](#)



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Return to first questions

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Welcome, twenty sbse | [Logout](#)

Guide Me

Please answer the questions below so we can route you to the right place.

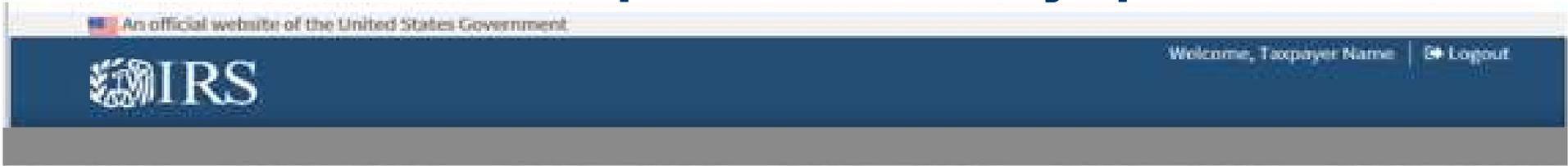
- What type of request would you like to submit?
- Form 2848, Power of Attorney and Declaration of Representative
 - Form 8821, Tax Information Authorization
 - Revocation/withdrawal of an existing authorization

Next

Answered Questions



Guide Me – skips unnecessary questions



Guide Me

Please answer the questions below so we can route you to the right place.

? In order to route your submission properly, please select one of the following for the taxpayer on line 1 of the form:

The taxpayer:

- has a domestic address
- has an international address
- is participating in a Low Income Tax Clinic (LITC) or Student Tax Clinic Program (STCP)

Next

Answered Questions

- ✓** What type of request would you like to submit?
Revocation/withdrawal of an existing authorization



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Signature Options for POA and TIA January 2021

	Mail/Fax/e-Fax to PPS	Online via <i>Submit Form 2848 and Form 8821</i>
Taxpayers	<ul style="list-style-type: none"> Wet signature only 	<ul style="list-style-type: none"> Image of Wet signature Electronic signature
Tax Professionals	<ul style="list-style-type: none"> Wet signature only 	<p><u>Form 2848</u></p> <ul style="list-style-type: none"> Image of Wet signature Electronic signature <p><u>Form 8821</u></p> <ul style="list-style-type: none"> No signature requirement



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**Signature Options for POA and TIA – cont'd
Summer 2021 – Add Tax Pro Account**

	Mail/Fax/e-Fax to PPS	Online via <i>Submit Form 2848 and Form 8821</i>
Taxpayers	<ul style="list-style-type: none"> Wet signature only 	<ul style="list-style-type: none"> Image of Wet signature Electronic signature
Tax Professionals	<ul style="list-style-type: none"> Wet signature only 	<p><u>Form 2848</u></p> <ul style="list-style-type: none"> Image of Wet signature Electronic signature <p><u>Form 8821</u></p> <ul style="list-style-type: none"> No signature requirement



Electronic Signature

Electronic signatures appear in many forms and may be created by many technologies. No specific technology is required. Examples of acceptable electronic signature methods include:

- A typed name that is typed into a signature block**
- A scanned or digitized image of a handwritten signature that is attached to an electronic record**
- A handwritten signature input onto an electronic signature pad**
- A handwritten signature, mark, or command input on a display screen with a stylus device**



Electronic Signature – cont'd

An electronic signature is an electronic symbol attached to an electronic record used by a person with an intent to sign. A digital signature is a form of an electronic signature that includes encrypted data produced by a mathematical process applied to a record using a hash algorithm and public key cryptography.



Authentication for F2848/8821 (1/3)

- If the taxpayer electronically signs the authorization form in a remote transaction, the taxpayer's identity must be authenticated.**
- Authentication for remote transactions, however, is not required where the individual has personal knowledge of the taxpayer's identity (e.g., through a previous business relationship, a personal relationship such as an immediate family member, or similar-type relationship such as between an employer and an employee).**



What does authentication mean?

- **Authentication requirement consistent with responsibilities under Circular 230**
 - **Sec. 10.22 Diligence as to accuracy**
 - Preparing or assisting in the preparation of, approving, and filing ...documents...relating to IRS matters
 - In determining the correctness of oral or written representations made by practitioner to Dept. of Treas.
 - **Sec. 10.34 Standards with respect to... documents and other papers submitted to the IRS**
 - 10.34(b) “not frivolous”



Authentication for F2848/8821 (2/3)

Proposed Change in Instructions for Form 2848 and 8821

To authenticate the taxpayer's identity for remote transactions, the individual must:

- 1. Inspect a valid government photo identification (ID) and compare the photo to the taxpayer via a self-taken picture of the taxpayer or video conferencing. Examples of government photo ID include a driver's license, employer ID, school ID, state ID, military ID, national ID, voter ID, visa or passport;**



Authentication for F2848/8821 (3/3)

Proposed Change in Instructions for Form 2848 and 8821

- 2. Record the name, Social Security Number or Individual Taxpayer Identification Number, address, and date of birth of the taxpayer; and**
- 3. Verify the taxpayer's name, address and Social Security Number through secondary documentation, such as a Federal or state tax return, IRS notice or letter, Social Security Card, or credit card or utility statement.**



Registering for Secure Access (1/3)

- **To use the “Submit Form 2848 and 8821 Online” platform, an individual must register for Secure Access**
 - Individuals already registered for secure access, including e-Services Online Tools for Tax Professionals or similar online tools, can use the upload platform to submit Forms 2848 and 8821



Registering for Secure Access (2/3)

- **To register for Secure Access, you will need:**
 - Your personal information and mailing address from your most recently filed tax return
 - Your financial account number
 - Your U.S. –based mobile phone to receive a one-time activation code
 - Or opt to receive the activation code through mail if you do not have a mobile phone



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Registering for Secure Access (3/3)

Make sure you have the following information available when you register for Secure Access:

- Email address
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status and mailing address
- One financial account number linked to your name (credit card, student loan, mortgage or home equity loan, home equity line of credit, or auto loan)
- Mobile phone linked to your name

Note: For more information on Secure Access, see [IRS.gov/Secure Access](https://www.irs.gov/SecureAccess)



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Submitting Forms

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E-Filing

E-file your client's returns



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Key Points



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Tax Pro Account Walk-Thru

**Richard Furlong, Jr.
Senior Stakeholder Liaison**

**45th Annual Delaware Federal & State Tax Institutes
December 7, 2021**



Tax Pro Account: Methods to Submit POAs and TIAs

Individuals have various options when submitting Power of Attorneys (POAs) and Tax Information Authorizations (TIA) to the IRS.



Mail*

Paper submission, paper processing.

Characteristics:

- Physical receipt of forms through mail
- Sorting and review process up to 15 days**
- Paper stored in IRS files until shredded

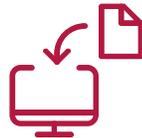


Fax*

Electronic submission via fax, electronic processing.

Characteristics:

- Electronic receipt of form images
- Review and Centralized Authorization File (CAF) entry up to 15 days**
- Online storage and records management



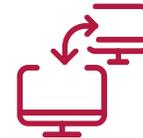
Deployed January 2021

Taxpayer Digital Communications (TDC)*

Electronic submission of Forms 2848/8821 via TDC, electronic processing.

Characteristics:

- Secure Access account required for submission
- Authorized third-party access to platform
- Image of electronic signature
- Review and CAF entry up to 15 days**
- Online storage and records management



To Deploy July 2021

Tax Pro Account

Electronic submission of online equivalents of Forms 2848/8821 via Tax Pro Account, electronic processing.

Characteristics:

- Dedicated interface for tax professionals integrated with individual taxpayers' Online Account for taxpayer access to approve or reject authorization requests online
- Secure Access via eAuth allows for identify and signature authentication
- CAF integration for real-time processing -- requests are submitted, validated and approved online with no manual intervention
- Electronic capture and storage of tax professional and taxpayer digital signatures using Electronic Signature Storage and Retrieval (ESSAR)
- IAL2/AAL2 compliant using Secure Access LOA-3 (NIST 63-3 compliant by FY2022)

*Forms submitted via Mail, Fax, and TDC are processed in First In, First Out (FIFO) basis.

**Typical processing timeframe is 5 days; however, timeframe was extended to up to 15 days due to COVID.



New Taxpayer Options for POA and TIA

Features launching summer 2021:

- IRS adds “authorization” feature to individual Online Accounts.
- IRS launches Tax Pro Account on IRS.gov to allow tax professionals to initiate online third-party authorization requests.
 - Tax professional initiates a POA or TIA, uses checkbox as electronic signature for POAs.
 - POA or TIA requests automatically transfers to individual taxpayer’s Online Account.
 - Taxpayer accesses their Online Account and select “Authorization” tab.
 - Taxpayer uses checkbox as signature and approves request.
 - Upon approval, authorization is automatically submitted to CAF.
- Most requests post immediately to CAF eliminating long waits for review and processing.
- Online Account and Tax Pro Account protected by identity proofing/multi-factor authentication (Secure Access).



Registering for Secure Access

To use the Tax Pro Account, individuals must register for Secure Access.

- Individuals already registered for secure access (e.g., Get Transcripts) can use the Tax Pro Account to initiate POAs and TIAs.
- To register for secure access, you will need:

- Your email address
- Your tax filing status, personal information, and mailing address from your most recently filed tax return
- Your Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- One financial account number linked to your name (credit card, student loan, mortgage or home equity loan, home equity line of credit, or auto loan)
- Your U.S. based cell phone to receive the one-time activation code
 - If you do not have a cell phone, you can opt to receive the activation code through mail

Note: For more information on Secure Access, see [IRS.gov/Secure Access](https://www.irs.gov/Secure Access)



Tax Pro Account: Secure Access

Notional

Secure Access



Sign Up

Don't have an account? Create one now.

CREATE ACCOUNT >

Log In

Already have a username? Welcome back!

Username

LOG IN >

[Forgot Username](#)

PTIN and FIRE users need a separate account in this system

WARNING! By accessing and using this government computer system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of, or access to, this computer system may subject you to criminal prosecution and penalties.

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Tax Pro Account: Log In

Notional

Secure Log In



We sent a security code to your phone

We sent a text message to your phone (ending in 1991). Please enter the code below.

6-digit security code

[Resend Security Code](#)

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Tax Pro Account: Request POA

Notional

Tax Pro Account Home Page (Full Screen)

IRS JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home Request POA Individual Client Request TIA Individual Client

Welcome JAMIE BEAGLE

Request Authorization

Submit a request online for a power of attorney (POA) or tax information authorization (TIA) for an individual client. Then let your client know they need to log in to their account at www.irs.gov/account to review and electronically sign.

REQUEST POA INDIVIDUAL CLIENT REQUEST TIA INDIVIDUAL CLIENT

Download Forms

You may continue to use paper forms to submit and withdraw authorizations by mail or fax:

[Form 2848, Power of Attorney and Declaration of Representative](#)

[Form 8821, Tax Information Authorization](#)

IRS Privacy Policy | Accessibility



Before You Start Page (Screen 1 of 2)

Request Power of Attorney (POA) Individual Client

Before You Start

You must have:

- A Centralized Authorization File (CAF) number, which the IRS assigns the first time you mail or fax a third-party authorization
- One of the following credentials and not be suspended or disbarred from practice before the IRS per [Circular 230 Tax Professionals](#)
 - Attorney
 - Certified Public Accountant
 - Enrolled Agent
 - Enrolled Actuary
 - Enrolled Retirement Plan Agent

Compare Options to Request POA

Request POA Online

Submit the request online if all the following are true.

- ✓ Individual client
- ✓ One representative
- ✓ Names and addresses match IRS records
- ✓ Addresses in U.S. states and D.C.
- ✓ One or more of these tax matters from the year 2000 forward:
 - Form 1040 Income Tax
 - Split Spousal Assessment or Form 8857 Innocent Spouse Relief
 - Shared Responsibility Payment
 - Shared Responsibility Payment - Split Spousal Assessment
 - Civil Penalty
- ✓ Revoke any prior authorization(s) on file with the IRS for the same tax matters and tax periods
- ✓ Client can log in to their account at www.irs.gov/account

[START NOW](#)

Mail or Fax Form 2848

Mail or fax a signed Form 2848 to the IRS if you need more options.

- ✓ Individual and business clients
- ✓ Name or address changes
- ✓ Addresses for any location
- ✓ One or more representatives
- ✓ Any tax matter and tax period
- ✓ Authorize other acts such as access IRS records via an Intermediate Service Provider
- ✓ Retain or revoke any prior authorization(s) on file with the IRS for the same tax matters and tax periods

[DOWNLOAD FORM 2848](#)



Before You Start Page (Screen 2 of 2)

How to Get a Power of Attorney Online

First: Prepare the information

To fill out the request, you'll need your:

- Centralized Authorization File (CAF) number [?](#)
- Name and address on file with the IRS for your CAF number [?](#)
- Client's name and address on file with the IRS [?](#)
- Client's Social Security number or Taxpayer Identification Number
- Tax matters and periods for which you are requesting authorization. Only some tax matters may be requested online.
 - Form 1040 Income Tax
 - Split Spousal Assessment or Form 8857 Innocent Spouse Relief
 - Shared Responsibility Payment
 - Shared Responsibility Payment - Split Spousal Assessment
 - Civil Penalty

You cannot save requests to continue later.

Second: Complete the request

It should take between 10 and 20 minutes to complete the request.

After you submit the request, you'll get confirmation that it's been sent to your client's online account.

If the information you entered for your client is not correct, they will not see the request in their online account.

Third: Contact your client

Let your client know that they need to log in to their account at www.irs.gov/account to review, approve and electronically sign the request.

Fourth: Client approves or rejects and contacts you

Your client logs in to their account at www.irs.gov/account and approves by electronically signing. They also may reject the request.

The authorization will be active after your client approves and electronically signs.

Your client can print confirmation after they sign it, but a copy of the authorization won't be saved in your client's account or your account.

The IRS won't notify you whether your client approves or rejects the request.

Contact your client with any questions about the status of a request.

Notices

OMB Control Number: 1545-0150

[Privacy Act and Paperwork Reduction Act Notice](#)

START NOW



Representative Information page - Step 1 (Screen 1 of 2)

JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home
Request POA Individual Client
Request TIA Individual Client

[Tax Pro Account Home](#) / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

1

2

3

4

Rep Info
Client Info
Tax Matters
Review & Submit

Representative Information

Enter your name, CAF number and address associated with your IRS CAF record. **It must match IRS records to continue and use approved abbreviations, such as St for street and Ave for avenue.** [See more abbreviations \(PDF\)](#).

Only one representative can be added online.

If your name or address has changed or you want to add more than one representative, mail or fax a completed [Form 2848](#) to the IRS instead.

All fields marked with an asterisk * are required.

First Name*
Special characters are limited to - (dash) and & (ampersand)

Middle Name
Special characters are limited to - (dash) and & (ampersand)

Last Name*
Special characters are limited to - (dash) and & (ampersand)

Suffix
Special characters are limited to - (dash) and & (ampersand)



Tax Pro Account: Request POA

Notional

Representative Information page - Step 1 (Screen 2 of 2)

CAF Number* [?](#)
Format example: 1234-56789

Address Line 1*
The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

Address Line 2
The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

City*
The number of characters is limited to 25. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

State*
Two letter abbreviation

ZIP*
Five digits

[Cancel](#)



Client Information page - Step 2 (Screen 1 of 2)

Request Power of Attorney (POA) Individual Client

Progress: 1. Rep. Info (checked), 2. Client Info, 3. Tax Matters, 4. Review & Submit

Client Information

Add one client per request. Submit a separate request for a spouse on a joint return.

Enter your client's information as shown on their most recent income tax return or IRS notice. **Use approved abbreviations, such as St for street and Ave for avenue.** [See more abbreviations \(PDF\).](#)

If your client's address has changed, use [Form 8822](#) to notify the IRS of the new address.

All fields marked with an asterisk (*) are required.

First Name*
Special characters are limited to - (dash) and & (ampersand)

Middle Name
Special characters are limited to - (dash) and & (ampersand)

Last Name*
Special characters are limited to - (dash) and & (ampersand)

Suffix
Special characters are limited to - (dash) and & (ampersand)



Tax Pro Account: Request POA

Notional

Client Information page - Step 2 (Screen 2 of 2)

Taxpayer Identification Number* ⓘ
Format example: 123-45-6789

Address Line 1*
The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

Address Line 2
The number of characters is limited to 35. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

City*
The number of characters is limited to 25. Special characters are limited to - (dash), / (forward slash), and & (ampersand)

State*
Two letter abbreviation

ZIP*
Five digits

[Cancel](#)



Tax Matters page - Step 3 (Full Screen)

JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home
Request POA Individual Client
Request TIA Individual Client

[Tax Pro Account Home](#) / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

✓

Rep Info

✓

Client Info

3

Tax Matters

4

Review & Submit

Tax Matters

Select the tax matters and periods for which you are requesting authorization. Tax periods are limited to the year 2000 up to three years from December 31 of the year we receive the power of attorney.

If you want to request authorization for something not included on this page, mail or fax a completed [Form 2848](#) to the IRS instead.

All fields marked with an asterisk (*) are required.

Tax Matter(s)

You must select at least one tax matter. After you select the tax matter, you will be prompted to select the start and end date for the tax period(s).*

- Form 1040 Income Tax
- Split Spousal Assessment or Form 8857 Innocent Spouse Relief
- Shared Responsibility Payment
- Shared Responsibility Payment - Split Spousal Assessment
- Civil Penalty

Receive Notices

Do you want to receive by mail copies of notices and communications the IRS sends your client for these tax matters?*

Yes No

BACK
NEXT

[Cancel](#)

55

Not to be used or cited as precedent



Tax Matters Expanded page - Step 3 (Screen 1 of 2)

JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home
Request POA Individual Client
Request TIA Individual Client

[Tax Pro Account Home](#) / [Request Power of Attorney \(POA\) Individual Client](#)

Request Power of Attorney (POA) Individual Client

[Rep. Info](#)
[Client Info](#)
Tax Matters
[Review & Submit](#)

Tax Matters

Select the tax matters and periods for which you are requesting authorization. Tax periods are limited to the year 2000 up to three years from December 31 of the year we receive the power of attorney.

If you want to request authorization for something not included on this page, mail or fax a completed [Form 2848](#) to the IRS instead.

All fields marked with an asterisk (*) are required.

Tax Matter(s)

You must select at least one tax matter. After you select the tax matter, you will be prompted to select the start and end date for the tax period(s).*

Form 1040 Income Tax

Split Spousal Assessment or Form 8857 Innocent Spouse Relief

Select starting and ending tax years for this matter. You must select at least one tax year between 2000 and up to three years from December 31 of the year we receive the power of attorney. Select add another tax year if there are breaks between the years. For example, enter as two periods: 2000 to 2010 and 2018 to 2024. Do not overlap years for the same tax matter. For example, do not enter 2000 to 2005 and 2004 to 2006.

1. Starting Tax Year*	Ending Tax Year*
<input style="width: 80%;" type="text" value="Select Year"/>	<input style="width: 80%;" type="text" value="Select Year"/>
2. Starting Tax Year*	Ending Tax Year*
<input style="width: 80%;" type="text" value="Select Year"/>	<input style="width: 80%;" type="text" value="Select Year"/> Delete

[+ Add another tax year](#)



Tax Pro Account: Request POA

Notional

Tax Matters Expanded page - Step 3 (Screen 2 of 2)

Tax Matter(s)

You must select at least one tax matter. After you select the tax matter, you will be prompted to select the start and end date for the tax period(s).*

Form 1040 Income Tax

Split Spousal Assessment or Form 8857 Innocent Spouse Relief

Select starting and ending tax years for this matter. You must select at least one tax year between 2000 and up to three years from December 31 of the year we receive the power of attorney. Select add another tax year if there are breaks between the years. For example, enter as two periods: 2000 to 2010 and 2018 to 2024. Do not overlap years for the same tax matter. For example, do not enter 2000 to 2005 and 2004 to 2006.

1. Starting Tax Year* Ending Tax Year*

2. Starting Tax Year* Ending Tax Year* [Delete](#)

[+ Add another tax year](#)

Shared Responsibility Payment

Shared Responsibility Payment - Split Spousal Assessment

Civil Penalty

Select the tax period(s) for this matter. You must select at least one tax period between 2000 and up to three years from December 31 of the year we receive the power of attorney. Select add another tax period if there are breaks between periods. For example, enter as two periods: March 2000 to September 2010 and March 2018 to March 2024. Do not overlap tax periods for the same tax matter. For example, do not enter March 2000 to December 2005 and December 2004 to December 2006.

1. Starting Tax Period* Ending Tax Period*

[+ Add another tax period](#)

Receive Notices

Do you want to receive by mail copies of notices and communications the IRS sends your client for these tax matters?*

Yes No

[Cancel](#)



Tax Pro Account: Request POA

Notional

Review and Submit page (Step 4) – Screen 1 of 2


JAMIE BEAGLE | Profile | Logout

Tax Pro Account Home
Request POA Individual Client
Request TIA Individual Client

[Tax Pro Account Home](#) / Request Power of Attorney (POA) Individual Client

Request Power of Attorney (POA) Individual Client

✓
[Rep Info](#)

✓
[Client Info](#)

✓
[Tax Matters](#)

4
[Review & Submit](#)

Review and Submit

Review your answers before you sign and submit. Use the Edit links to go back to pages if you need to edit information.

All fields marked with an asterisk (*) are required.

Representative Information [Edit](#)

Name [First Name Middle Name Last Name Suffix]

CAF Number [XXXX-XXXX]

Address [Address Line 1, Address Line 2, City, State, ZIP]

Client Information [Edit](#)

Name [First Name Middle Name Last Name Suffix]

Taxpayer Identification Number [XXX-XX-XXXX]

Address [Address Line 1, Address Line 2, City, State, ZIP]

Tax Matters [Edit](#)

Tax Matter [Tax Matter Selected]

Tax Period(s) [Date(s) Selected]

[Date(s) Selected]

[Date(s) Selected]



Tax Pro Account: Request POA

Notional

Review and Submit page (Step 4) – Screen 2 of 2

Tax Matters Edit	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
Receive Notices	[Yes, No]

Declaration of Representative

I declare under penalties of perjury that:

- 1. I am not currently suspended or disbarred from practice, or ineligible for practice, before the Internal Revenue Service.*
- 2. I am subject to regulations contained in Circular 230 (31 CFR, Subtitle A, Part 10), as amended, governing practice before the Internal Revenue Service.*
- 3. I am authorized to represent the taxpayer identified in this request for the matters specified in this request.*

4. I am one of the following: (You will be prompted to enter your credentials.)*

- Attorney in good standing of the bar of the highest court of the state.
- Certified Public Accountant with an active license to practice in the state.
- Enrolled Agent by the IRS per the requirements of Circular 230.
- Enrolled Actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242. The authority to practice before the IRS is limited by section 10.3(d) of Circular 230.
- Enrolled Retirement Plan Agent under the requirements of Circular 230. The authority to practice before the IRS is limited by section 10.3(e) of Circular 230.

Electronic Signature

Under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.*

[Cancel](#)



Confirmation Page (Screen 1 of 2)

Request Submitted

Rep Info Client Info Tax Matters Review & Submit **Confirmation**

Success!
 Your authorization request has been sent to your client's account for review and approval.
 If the information you entered for your client is not correct, they will not see the request in their online account.

What Happens Next

Contact your client. Let your client know that they need to log in to their account at www.irs.gov/account to review, approve and electronically sign the request. The authorization will be processed after your client approves and electronically signs. It may take up to two business days to process after your client signs. Your client may print confirmation and give you a copy of the signed authorization.

⚠ The IRS won't notify you whether your client approves or rejects the request.
 Contact your client with any questions about the status of a request.

Print Request for Power of Attorney

Print or save a copy of the request now.
 You won't be able to view or print the request after you leave this page.

Representative Information



Tax Pro Account: Request POA

Notional

Confirmation Page (Screen 2 of 2)

Representative Information	
Name	[First Name Last Name]
CAF Number	[XXXX-XXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]
Client Information	
Name	[First Name Last Name]
Taxpayer Identification Number	[XX-XX-XXXX]
Address	[Address Line 1, Address Line 2, City, State, ZIP]
Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
	[Date(s) Selected]
Receive Notices	[Yes, No]
Declaration of Representative	
I am not currently suspended or disbarred from practice, or ineligible for practice, before the Internal Revenue Service.	
I am subject to regulations contained in Circular 230 (31 CFR, Subtitle A, Part 10), as amended, governing practice before the Internal Revenue Service.	
I am authorized to represent the taxpayer identified in this request for the matters specified in this request.	
I am a(n) [Attorney, CPA, Enrolled Agent, Enrolled Actuary, Enrolled Retirement Plan Agent, and applicable credentials]	
Electronic Signature	
Signed by Representative	[Date]



Tax Pro Account: Taxpayer Respond to POA Request

Notional

Authorizations Tab in Online Account (Full Screen)

Authorizations

You may authorize representatives to:

- Receive your confidential tax information by approving a Tax Information Authorization (TIA)
- Represent you before the IRS and receive your confidential tax information by approving a Power of Attorney (POA)

Authorizing someone to represent you does not relieve you of your tax obligations.

Online Requests from Tax Pros

View requests for authorization tax professionals submitted online.
Contact the tax professional if you have questions about a request.

Tax Pro Name	Date Requested	Status	Actions
Beagle, Jamie	10/14/2020	Pending	Approve/Reject
Hound, John	07/10/2020	Processing	View
Hound, John	06/16/2019	Rejected	View
Hound, John	07/16/2018	Approved	View
Eyre, Jane	09/24/2016	Failed	View

Authorization Forms

You may mail or fax a signed authorization to the IRS:

- [Form 8821, Tax Information Authorization](#)
- [Form 2848, Power of Attorney and Declaration of Representative](#)



Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Views Pending POA Request (Screen 1 of 2)

The screenshot displays the IRS Tax Pro Account interface. At the top, the IRS logo is on the left, and the user's name 'SUSAN BIRCH' with links for 'Profile' and 'Logout' is on the right. A navigation bar contains links for 'Account Home', 'Account Balance', 'Payment Options', 'Payment History', 'Tax Records', 'Message Center', and 'Authorizations'. The main content area is titled 'Review Request for Power of Attorney (POA)'. It contains a paragraph explaining that a tax professional has requested authorization to represent the taxpayer before the IRS. Below this, it states that the tax professional requested this authorization, not the IRS, and advises the taxpayer to carefully review the request. A 'Reject the request if:' section lists three conditions: 'You did not request this authorization', 'Any information is incorrect', and 'You don't want to approve the request'. It then states that to approve, the taxpayer must check a box under 'Sign to Approve' and to contact the tax professional if they have questions. The authorization will be active after review and approval. A 'Request for Power of Attorney (POA)' section follows, containing a table with the following information:

Your Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
Address	[Address Line 1, Address Line 2, City, ZIP]
Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number ?	[1111-11111]
Address	[Tax Pro First Name Middle Name Last Name Suffix]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]



Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Views Pending POA Request (Screen 2 of 2)

Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number ?	[1111-11111]
Address	[Tax Pro First Name Middle Name Last Name Suffix]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]
Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Receive Notices	The representative will receive copies of notices and communications the IRS sends you for these tax matters.
Sign and Submit	
If you want to approve the request, check the box and then select Approve Request.	
<input type="checkbox"/> By checking this box, I authorize the designated representative to represent me before the IRS and receive confidential tax information for the matters described in this power of attorney. Under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.	
<div style="display: flex; justify-content: space-around;"> REJECT REQUEST APPROVE REQUEST </div>	
Cancel	
Notices:	
<ul style="list-style-type: none"> OMB Control Number: 1545-0150 Privacy Act and Paperwork Reduction Act Notice 	



Privacy Policy | Accessibility



Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Successfully Approves a POA Request (Screen 1 of 2)

The screenshot shows the IRS Tax Pro Account interface. At the top, the IRS logo is on the left, and the user's name 'SUSAN BIRCH' with 'Profile' and 'Logout' links is on the right. A navigation bar contains links for 'Account Home', 'Account Balance', 'Payment Options', 'Payment History', 'Tax Records', 'Message Center', and 'Authorizations'. Below this, a breadcrumb trail reads 'Account Home / Authorizations / Authorization Approved'. The main heading is 'Authorization Approved'. A green success message box contains a checkmark icon and the text: 'Success! [Tax Pro First Name Middle Name Last Name Suffix] is authorized to represent you before the IRS and receive confidential tax information for the matters described in this power of attorney.' Below the message is an 'Authorization' section with explanatory text: 'You may want to give your tax professional a copy of the authorization. IRS doesn't notify the tax professional that you signed the authorization or send them a copy.' The form is divided into three sections: 'Your Information', 'Representative Information', and 'Tax Matters'. Each section contains several fields with placeholder text.

Your Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
Address	[Address Line 1, Address Line 2, City, ZIP]

Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number [?]	[1111-11111]
Address	[Address Line 1, Address Line 2, City, ZIP]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]

Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]



Tax Pro Account: Taxpayer Respond to POA Request

Notional

Taxpayer Successfully Approves a POA Request (Screen 2 of 2)

Representative Information	
Name	[Tax Pro First Name Middle Name Last Name Suffix]
CAF Number	[1111-11111]
Address	[Address Line 1, Address Line 2, City, ZIP]
Declaration of Representative	The representative signed that they are a Certified Public Accountant who is not suspended or disbarred from practice before the IRS.
Signed by Representative	[Date(s) Selected]
Tax Matters	
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Tax Matter	[Tax Matter Selected]
Tax Period(s)	[Date(s) Selected]
Receive Notices	The representative will receive copies of notices and communications the IRS sends you for these tax matters.
Electronic Signature	
Signed by Taxpayer	[Date(s) Selected]
Back to Authorizations	



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Tax Pro Account: Authorization Processing

- After taxpayer signs and approves authorization, the IRS again checks to see if tax professional is in good standing.
- If authorization clears validation, it is posted immediately (at least within 48 hours) to the Centralized Authorization File (CAF).
- Ability to have multiple representatives per authorization:
 - Each tax professional initiates authorization from their own Tax Pro Account
 - Taxpayer must sign all authorizations on the same day.
 - Only two tax professionals can elect to receive copies of IRS notices and communications sent to taxpayer
 - If more than two tax professionals make an election, after approval of the first two authorization by the taxpayer, the remaining authorizations will not be processed.



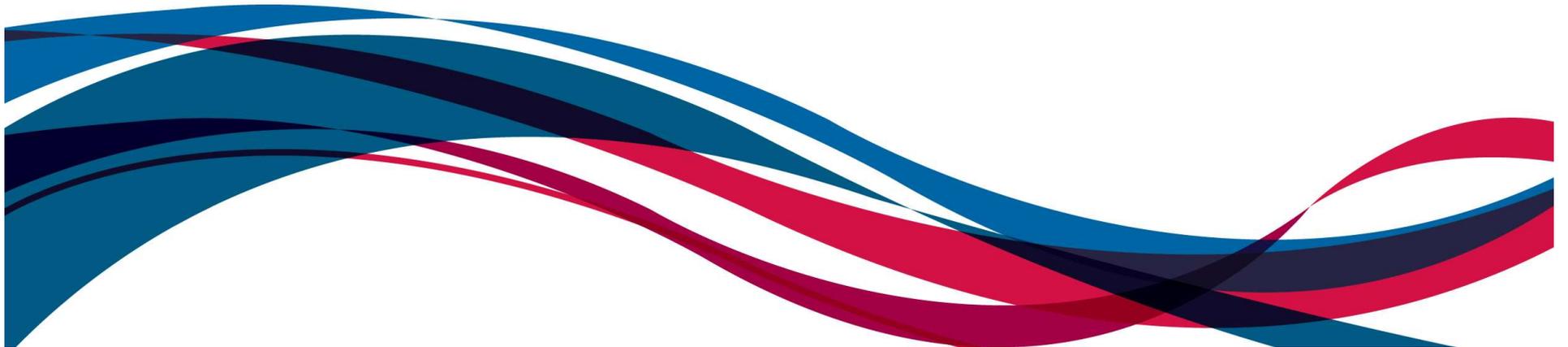
Tax Pro Account: Future State

- IRS will continue to build on this initial release of Tax Pro Account to improve its features for authorization requests and, in later years, to add functionality as resources allow. Additional features requested and considered:
 - Tax professional's ability to view their authorization history, to include pending requests and statuses.
 - Notification to the taxpayer regarding action in their Online Account, to include pending authorization requests.
 - Taxpayer's ability to view their complete authorization history.
- IRS is also aware some taxpayers have difficulty creating Online Accounts (e.g., can't pass Secure Access registration) and is working on that issue.



IRS NEXT Overview

September 2021





Background

- Over the last ten years, IRS' budgets have decreased or remained flat despite increasing demands on the agency. As a result, IRS personnel has dramatically reduced through attrition and hiring freezes, which has constrained the agency mission and business results.
- In January 2021, pursuant to the [Taxpayer First Act](#), IRS published a [Report to Congress](#) (RTC) which included recommendations for organizational redesign to reduce inefficiencies and improve the taxpayer and employee experience.
- Building on the work the Taxpayer First Act Office did to publish the TFA Report to Congress, and with potential for increased hiring, we're focused on building an IRS for the next generation.
- We're now shifting our focus to prioritize the long-term strategic recommendations in the Report to outline how we're structured, how the agency operates and how we make progress with our FY2022 budget resources.
- The TFA Office is becoming the IRS NEXT Office, which will focus on both the design and implementation of a revitalized IRS organization and, in partnership with HCO, lead a servicewide effort to integrate our recruiting, hiring, training and onboarding efforts.



Report to Congress Strategy Implementation

- The Taxpayer Experience Office (TXO), led by Chief Taxpayer Experience Officer Ken Corbin, is standing up to implement the taxpayer experience strategies outlined in the Report to Congress.
- Ten cross-functional project teams have been established to help operationalize the Training Strategy. These teams are comprised of subject matter experts from the business units and training experts in the Human Capital Office.
- IRS NEXT will coordinate activities related to organizational redesign.



IRS NEXT Office Structure

IRS Commissioner
Charles Rettig

Director
Heather Maloy

Organizational Redesign
Julie Caldwell

Recruiting
Lisa Beard

Hiring
Anita Hill

Training
Barbara Harris

Employee Experience
Jim Clifford

Program Management & Governance
George Contos

Communications & Change Management
Lisa Beard



IRS NEXT Organizational Redesign

Build out a structure that will:

- Improve operational efficiency
- Be more nimble so we can begin reducing the tax gap
- Improve the employee and taxpayer experience
- Make the IRS a compelling place to work that attracts the next generation by supporting learning and career advancement





Questions?

You can always ask questions or submit feedback to **IRSNext@irs.gov**



**Communications & Liaison
STAKEHOLDER LIAISON**

THANK YOU!



Richard Furlong, Jr.

Senior Stakeholder Liaison

richard.g.furlong@irs.gov

Yvette Brooks-Williams

Senior Stakeholder Liaison

yvette.brookswilliams@irs.gov